

## AUTHORIZED FEDERAL SUPPLY SCHEDULE PRICE LIST

On-line access to contract ordering information, terms and conditions, up-to-date pricing, and the option to create an electronic delivery order are available through GSA *Advantage!*, a menu-driven database system. The INTERNET address GSA *Advantage!* is: [GSAAdvantage.gov](http://GSAAdvantage.gov).

Human Resources and EEO Services  
FSC Group 738X  
Contract Number – **GS-02F-164BA**

For more information on ordering from Federal Supply Schedules click on the FSS Schedules button at [www.fss.gsa.gov](http://www.fss.gsa.gov)

**Contract Period:** September 24, 2014 thru September 23, 2019



**2939 McManus Road  
Macon, GA 31220**

**TEL : (877) 864-1145**

**FAX: (877) 772-9155**

Web address: [www.retireinstitute.com](http://www.retireinstitute.com)

Business Classification: **Small Business**

### INFORMATION FOR ORDERING ACTIVITIES:

1. Awarded Special Item Number: **595-21** Human Resource Services (Excluding EEO Services) [R799].
2. Maximum Order: \$1,000,000 USD
3. Minimum Order: \$100.00 USD
4. Geographic Coverage:  
  
The 48 Contiguous States and the District of Colombia.
5. Points of Production: Various

6. Prices herein are net:

Course Title	Course Descriptions	Course Length	Minimum Participants	Maximum Participants	Price Offered To GSA (including IFF)
<b>Planning for Retirement Seminar</b>	Being fully prepared for retirement takes wise planning, proactive measures, and concise information. This 1 or 2 day course imparts a working knowledge which empowers an employee to take control of their retirement preparation. It is a comprehensive workshop that not only involves classroom instruction but also gives each employee tools to develop their own annuity estimates, Social Security benefit estimates, TSP projections, annuity adjustments, budgets, financial pictures, and planning strategies. Separate courses are available for employees covered by the FERS and CSRS retirement programs. The Planning For Retirement seminar provides participants with a detailed understanding of the benefits they are entitled to under the Civil Service Retirement System (CSRS) and/or the Federal Employees Retirement System (FERS), Social Security, Medicare, the Thrift Savings Plan (TSP), the federal Employees Health Benefits Program (FEHB), long term care insurance, the Federal Employees' Group Life Insurance Program (FEGLI), and the flexible spending account program. The seminar focuses on employees who are approximately within 5 years of retirement, and encompasses Financial Planning and Transition to Retirement sessions. The 2 day course allows for more time to fully analyze an employee's Social Security benefits as well as more time to cover in depth financial planning strategies.	Full Day 6 Hours  Note: Can be Customized from 1 day to 2 days	5	Depends On Size Of Facility	\$114.14

Course Title	Course Descriptions	Course Length	Minimum Participants	Maximum Participants	Price Offered To GSA (including IFF)
<b>Planning for Retirement: Special Group Employees</b>	The Planning for Retirement seminar provides participants with a detailed understanding of the benefits they are entitled to under the Civil Service Retirement System (CSRS) and/or the Federal Employees Retirement System (FERS), Social Security, Medicare, the Thrift Savings Plan (TSP), the Federal Employees Health Benefits program (FEHB), Long Term Care Insurance, the Federal Employees' Group Life Insurance program (FEGLI), and the Flexible Spending Account program. The seminar focuses on employees who are approximately within 5 years of retirement. The seminar focuses on special group employees who are approximately within 5 years of retirement.	Full Day 6 Hours	5	Depends On Size Of Facility	\$114.14
<b>Mid-Career Retirement Planning Seminar</b>	Mid-Career Retirement Planning seminar provides participants with a detailed understanding of the benefits they are entitled to under the Civil Service Retirement System (CSRS) and/or the Federal Employees Retirement System (FERS), Social Security, Long Term Care Insurance, the Thrift Savings Plan (TSP), the Federal Employees Health Benefits program (FEHB), the Federal Employees' Group Life Insurance program (FEGLI), and the Flexible Spending Account program. The seminar focuses on employees who are approximately within 5-15 years of retirement.	Full Day 6 Hours	5	Depends On Size Of Facility	\$114.14
<b>Mid-Career Retirement Planning– Special Group Employees</b>	Mid-Career Retirement Planning seminar provides participants with a detailed understanding of the benefits they are entitled to under the Civil Service Retirement System (CSRS) and/or the Federal Employees Retirement System (FERS), Social Security, Long Term Care Insurance, the Thrift Savings Plan (TSP), the Federal Employees Health Benefits program (FEHB), the Federal Employees' Group Life Insurance program (FEGLI), and the Flexible Spending Account program. The seminar focuses on special group employees who are approximately within 10-15 years of retirement.	Full Day 6 Hours	5	Depends On Size Of Facility	\$114.14

Course Title	Course Descriptions	Course Length	Minimum Participants	Maximum Participants	Price Offered To GSA (including IFF)
<b>Tax &amp; Financial Planning:</b>	This four hour session is designed to present the basics of personal financial planning to participants and is taught by a CPA. The seminar is devoted to financial planning topics including tax planning, insurance planning, investment planning, and estate planning. This seminar focuses specifically on federal employees. The course goes into great detail on how to utilize the Roth within the TSP, discusses the various Social Security options and how to integrate all of these federal benefits into a solid retirement plan.	4 Hours	5	Depends On Size Of Facility	\$114.14
<b>Transition to Retirement Training Sessions:</b>	This seminar for Separating Employees provides a summary of the disposition of employee benefits and the options to continue, modify, or convert those benefits upon separation. This seminar discusses issues pertinent to post retirement, i.e., including the spouse in the planning phase, how to maximize benefits, and how to put together a focused retirement plan. The course is designed to go through the retirement paperwork utilizing the employee's retirement documents.	Full Day 6 Hours	5	Depends On Size Of Facility	\$114.14
<b>New Employee Benefits Orientation</b>	This seminar focuses on each employee benefit program (FERS, FEHB, FEGLI, TSP, Long Term Care Insurance, Flexible Spending Accounts and Social Security) and explains how each program works and how to receive the maximum benefit from each program.	Full Day 6 Hours	5	Depends On Size Of Facility	\$114.14

7. Quantity Discounts:

- A quantity discount of 3% on training courses with an accumulated order \$75,000, and over.
- A quantity discount of 2% on training courses with an accumulated order \$50,000 - \$74,999.
- A quantity discount of 1% on training courses with an accumulated order \$25,000 - \$49,999.

8. Prompt Payment Terms: None

9. Government purchase cards are accepted below and above the micro-purchase threshold. Yes

10. Foreign Item: N/A

11. Delivery Time:  
30 Days (ARO)

12. FOB Points: Destination

13. Ordering Address:

Retirement Benefits Institute  
2939 McManus Road, Macon, GA 31220

TAX ID # 27-3144932

CAGE CODE: 69Y42

14. Payment Address:

Retirement Benefits Institute  
2939 McManus Road, Macon, GA 31220

15. Warranty Provisions: NA

16. Export Packaging: Handled per request: NA

17. Terms and conditions of Gov't Credit Cards: Accept any above micro-purchase threshold.: Yes

Retirement Benefits Institute will accept the Government purchase credit card for purchases equal to or less than the micro-purchase threshold; however, Retirement Benefits Institute will also accept the Government purchase credit card for purchases over the micro-purchase threshold.

18. Terms and conditions of rental, maintenance, and repair (if applicable). NA

19. Terms and conditions of installation (if applicable). NA

20. Terms and conditions of repair parts indicating date of parts price lists and any discounts from list prices (if applicable). NA

20a. Terms and conditions for any other services (if applicable). NA

21. List of service and distribution points (if applicable). NA

22. List of participating dealers (if applicable). NA

23. Preventive maintenance (if applicable). NA

24a. Special attributes such as environmental attributes (e.g., recycled content, energy efficiency, and/or reduced pollutants). NA

24b. If applicable, indicate that Section 508 compliance information is available on Electronic and Information Technology (EIT) supplies and services and show where full details can be found (e.g. contractor's website or other location.) The EIT standards can be found at:[www.Section508.gov](http://www.Section508.gov). NA

25. Data Universal Number System (DUNS) number. 019091265

26. Notification regarding registration in System for Award Management (SAM) . Retirement Benefits, Inc. is registered in the SAM (System for Award Management) Database under Cage Code 69Y42.